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**Certified Specialist - Family Law
The State Bar of California
+A Professional Law Corporation*

DOCUMENTS TO BE GATHERED

1. Tax Returns for the past 3 years
2. W-2's, 1099's for the last calendar year
3. Last 3 paycheck stubs from all employers
4. Deeds for all real property owned
5. Current mortgage statements for all real property owned
6. Copy of recent property tax bill for all real properties owned
7. Titles for all vehicles, boats, trailers, etc., owned (and Kelly Blue Book printouts of current values, if available)
8. Current loan statements for all vehicles, boats, trailers, etc. owned
9. Current copies of all existing bank account statements (checking, savings, credit union, etc.)
10. Current copies of all existing stock and/or brokerage/investment accounts
11. Current copies of all IRA statements
12. Current copies of all other retirement and/or pension accounts, including Plan Booklets, if available
13. Last 3 years tax returns for any partnership, corporation or other business entity
NOTE: If your business income/expenses are reflected on Schedule C on your individual tax returns, you will need to prepare a year-to-date Profit & Loss Statement for that business
14. Copies of all loan documents and or promissory notes owned (other than mortgages)
15. Current copies of statements for all credit card accounts